

INDUSTRIES AND WORKS OF THE STATE OF SOUTH AUSTRALIA FOR THE YEAR 1927-28.

PRELIMINARY STATEMENT.

In view of the general unfavorable outlook of the business of the State for the year 1928, the Government Statist arranged to expedite the analysis and compilation of the Annual Returns from the Factories and Works for the year ended June 30th, 1928. He is thus now in a position to issue preliminary information with sufficient detail to convey a reasonable survey of the main features of the activities of the Secondary Industries for the year ended June 30th last, in comparison with the previous year and the previous five years.

The figures now made available (Returns 1 & 2) may be accepted as generally complete for the items dealt with, though, owing to a few returns being under query, and others not yet to hand, allowances for such have had to be made and thus all 1927-28 figures in this report must be considered as preliminary, subject to revision when the whole compilation is complete in about one month's time. This revision, however, will not be material.

In the aggregate the position cannot be said to have been as depressing for the period reviewed as may perhaps have been estimated by the general community. It is true, there are many decreases compared with the previous year, but, remembering that that year was in the aggregate a record one, the decreases are not of such magnitude as to be alarming. Still they call for watchfulness especially as regards certain individual industries competing with other States.

At this stage of the compilation it is not possible to analyse individual industries very closely, as, except in only a few cases, the volume of output will not be completed for another month. A section of this report, however, touches on a few groups of industries which are subject to considerable Interstate competition and much practical information may be acquired by the study of this section by those immediately concerned.

1. NUMBER OF ESTABLISHMENTS. [In following these notes please refer to Summary Returns Nos. 1 & 2 at back hereof.]

1,871 (1,807) increase 64. The increase for five years being 262. This is modified, however, by the fact that 73 Bakeries have been included in this year's figures for the first time, it having been decided at the last Conference of Statisticians that they should be included with the Secondary Industries.

2. HANDS AND POWER EMPLOYED.

Employees.

The average number of employees for the time the various factories were in operation numbered 40,217 (42,164) decrease 1,947, but an increase of 5,522 in the five years. These figures included 1,517 Working Proprietors. Males numbered 33,173 or 82.48% of the total and females 7,044 or 17.52%. These percentages have remained fairly constant for the last three years.

Excluding the hands employed in the Bakeries, which have been included for the first time, the decrease of 1,947 hands would be increased to 2,500.

The principal industries showing decreased hands were:- Motor Body Building 829, Agricultural Implements 246, Sawmills 124, Bricks and Tiles 100, Engineering 163, Clothing (all kinds) 803, Boots and Shoes (manufacture) 74, Coach and Wagon 84, Furniture 101, Railway Workshops, &c. 375, Flour Mills 24.

In a few industries increases are noted; Electric Lighting, Gas, Printing, Chemical Fertilisers, Sugar Refining, Jams etc.

POWER ACTUALLY USED.

152,318 (146,153) horsepower, increase 6,165 h.p. and 85,318 h.p. for the five years.

3. EXPENDITURE ITEMS.

a. Salaries and Wages.

The estimated salaries and wages to Working Proprietors for their labor was £444,511 (£441,269) and to Employees £8,177,541 (£8,390,603) decrease £213,062 but an increase of £2,233,796 for the five years. The average earnings per employee for time worked (ex Working Proprietors) was £211:6:1 (£206:7:4), increase £4:18:9 and £32:9:6 for five years.

b. Material, Fuel and Light.

£22,007,115 (£23,233,063), decrease £1,225,948 but an increase of £5,043,108 for the five years. The factories and works of the State consumed approximately 340,000 tons of Coal and 105,000 tons of Coke annually. The 1927-28 figures are not yet ready.

4. VALUE OF OUTPUT.

This represents the gross selling value of the result of the year's labor. £35,436,683 (£36,888,469) decrease £1,451,786 but an increase of £8,532,908 for the five years.

The output value was heavily affected by the set back in the Motor Industry and the lower values of Smelting Products. Flour Mills, Sawmills, Breweries, Wineries, Furniture, Tailoring Boots, Bricks also showed substantial decreases.

On the other hand, the Sugar Refining, now rebuilt after fire, Printing, Drugs and Chemicals and Chemical Fertilisers showed good increases, specially the latter.

5. VALUE OF PRODUCTION - being the value added to material by the process of manufacture or treatment. £13,429,568 (£13,655,406), decrease £225,838 but an increase of £3,489,800 for the five years.

6. VALUE OF FACTORY PREMISES AND LAND, PLANT AND MACHINERY.

| | |
|---------------------|---------------------------|
| Land and Buildings | £8,796,936 (£8,207,999) |
| Plant and Machinery | £9,378,442 (£8,741,929) |
| Total | £18,175,378 (£16,949,928) |

increase £1,225,450 for the year and £7,331,859 for the five years.

7. FACTORIES CLOSED DURING THE LAST FIVE YEARS.

During the last five years, a number of factories have been closed, representing an output of not less than £750,000. They represent the following industries:- Sawmills, Engineering, Boots and Shoes, Clothing, Flour Milling, Confectionery and Glass Bottles.

8. INTERSTATE COMPETITIVE INDUSTRIES.

There are quite a number of industries which may be classed as subject to severe competition from the other States. The principal group probably is clothing of all description. This State imports heavily Boots and Shoes and all kinds of wearing apparel from the other States, probably worth several million pounds. It is said that some of our big firms actually send their own material to other States to be manufactured instead of having it manufactured locally, thus paying freight both ways. There is room for big expansion here if whatever disability there may be can be overcome.

Indenting from Oversea Countries is heavy in both New South Wales and Victoria and the transfers to other States in made up goods, considerable. Why cannot a greater proportion of these shipments come direct to South Australia and be made up here?

A five years review of some of these Industries indicates very moderate progress and in some cases a backward movement.

| Item and Unit | | Y E A R S | | | |
|--|-----|------------|------------|-----------|-----------|
| | | 1922-23 | 1925-26 | 1926-27 | 1927-28 |
| <u>BUTTER AND CHEESE</u> | | | | | |
| Hands | No. | 284 | 325 | 324 | 339 |
| Output | £ | 924,329 | 995,157 | 948,503 | 935,660 |
| Butter made | lb. | 10,927,220 | 10,146,858 | 9,857,791 | 8,241,612 |
| Cheese made | lb. | 3,261,165 | 3,636,181 | 3,708,730 | 3,398,173 |
| <u>FLOUR MILLS</u> | | | | | |
| Hands | No. | 596 | 539 | 537 | 513 |
| Output | £ | 1,688,414 | 2,287,915 | 2,201,740 | 1,883,276 |
| Flour made | ton | 109,761 | 138,127 | 140,426 | 123,309 |
| <u>JAMS, PICKLES & SAUCES, &C.</u> | | | | | |
| Hands | No. | 549 | 556 | 560 | 620 |
| Output | £ | 392,246 | 439,279 | 514,215 | 506,869 |
| Jams and Jellies | lb. | 7,101,487 | 6,354,678 | 8,823,054 | 7,283,830 |
| <u>BISCUITS AND CONFECTIONERY.</u> | | | | | |
| Hands | No. | 717 | 656 | 668 | 650 |
| Output | £ | 410,289 | 445,982 | 426,696 | 424,661 |
| <u>DRUGS AND CHEMICALS.</u> | | | | | |
| Hands | No. | 185 | 195 | 200 | 181 |
| Output | £ | 98,952 | 182,601 | 196,404 | 201,303 |

| Item and Unit | | Y E A R S | | | |
|----------------------|-----|---|-----------|-----------|------------|
| | | 1922-23 | 1925-26 | 1926-27 | 1927-28 |
| | | <u>FERTILISERS (CHEMICAL)</u> (good increase) | | | |
| Hands | No. | 511 | 661 | 745 | 771 |
| Output | £ | 477,522 | 728,707 | 895,533 | 1,018,585 |
| Superphosphates made | ton | 132,416 | 155,768 | 171,288 | 206,536 |
| | | <u>SOAP AND CANDLES.</u> | | | |
| Hands | No. | 213 | 243 | 250 | 257 |
| Output | £ | 287,948 | 316,907 | 309,687 | 283,851 |
| Soap made | cwt | 97,411 | 128,256 | 110,952 | 118,218 |
| | | <u>ENGINEERING, IRONWORKS & FOUNDRIES, &C.</u> | | | |
| Hands | No. | 3,075 | 3,697 | 3,535 | 3,267 |
| Output | £ | 1,486,663 | 1,849,535 | 1,927,411 | 1,949,373 |
| | | <u>BOOTS AND SHOES (INC. REPAIRS.)</u> | | | |
| Hands | No. | 941 | 778 | 799 | 711 |
| Output | £ | 392,723 | 290,104 | 321,764 | 298,898 |
| Boots & Shoes made | pr. | 576,655 | 396,506 | 451,412 | 374,870 |
| Slippers &c. made | pr. | 31,971 | 24,269 | 25,040 | 32,799 |
| Uppers made | pr. | 9,862 | 9,363 | 8,053 | 6,440 |
| | | <u>CLOTHING (EX. BOOTS AND SHOES)</u> Including Slop Clothing, Tailoring, Mantle-making, Whitework, Underclothing, Hats and Caps, Furriers and Knitting.) | | | |
| Hands | No. | 4,438 | 4,475 | 4,485 | 3,682 |
| Output | £ | 1,290,844 | 1,440,854 | 1,560,085 | 1,233,517 |
| | | <u>BARK AND TANNING.</u> | | | |
| Hands | No. | 284 | 264 | 255 | Incomplete |
| Output | £ | 243,284 | 257,285 | 266,478 | " |
| Bark produced | ton | 5,379 | 6,329 | 9,806 | " |
| Leather produced | lb. | 1,588,972 | 1,488,188 | 1,439,638 | " |

W.L. JOHNSTON,

Statistical Office,
ADELAIDE,
20th February, 1929.

GOVERNMENT STATIST &
REG. GEN. OF B.D. & M.

RETURN NO. 1.

MAIN PARTICULARS IN CLASS GROUPS FOR YEAR 1927-28. GRAND TOTALS
AND INCREASES OR DECREASES ON PREVIOUS YEAR.

GRAND TOTALS.

| Class Group | No. of Es- tabs. | Total No. of Hands | Horse-power actual- ly used H.P. | Salaries and Wages includ- ing W.P. £ | Materials and Fuel, &c. £ | Output Value £ |
|---|---------------------|--------------------|--|---|------------------------------|-------------------|
| ting Raw Materials | 93 | 868 | 2,084 | 167,903 | 877,565 | 1,129,298 |
| , Fats | 11 | 309 | 501 | 62,137 | 240,818 | 339,209 |
| e, clay, glass | 105 | 2,180 | 5,832 | 494,327 | 565,785 | 1,374,435 |
| l Works, machinery | 242 | 9,960 | 10,631 | 2,432,123 | 6,037,795 | 9,402,785 |
| ing in wood | 149 | 1,994 | 4,419 | 467,237 | 1,306,918 | 1,995,743 |
| , Drinks * | 409 | 5,559 | 14,006 | 1,145,080 | 7,840,996 | 10,156,773 |
| hing, Textile | | | | | | |
| fabrics | 323 | 5,610 | 1,723 | 748,987 | 1,147,347 | 2,177,695 |
| s, Paper, Printing | 111 | 2,473 | 1,891 | 539,954 | 542,351 | 1,419,403 |
| cles, saddlery | | | | | | |
| harness | 206 | 5,646 | 4,419 | 1,275,986 | 1,347,453 | 3,040,425 |
| iture, Bedding | 104 | 1,590 | 2,347 | 294,392 | 409,894 | 811,934 |
| s, Chemicals | 22 | 1,148 | 5,249 | 259,904 | 910,952 | 1,449,276 |
| , Light & Energy | 32 | 2,061 | 98,386 | 561,820 | 626,542 | 1,751,503 |
| Other | 64 | 819 | 830 | 172,202 | 152,699 | 388,204 |
| Total 1927-28 | 1,871 | 40,217 | 152,318 | 8,622,052 | 22,007,115 | 35,436,683 |
| Total 1926-27 | 1,807 | 42,164 | 146,153 | 8,831,872 | 23,233,063 | 36,888,469 |
| INCREASE OR DECREASE (-) EACH GROUP ON 1926-27. | | | | | | |
| ting Raw Material | - 9 | - 31 | -135 | - 4,833 | 15,087 | 17,641 |
| , fats | - | - 6 | - 5 | 4,497 | -5,417 | -38,966 |
| o, clay, glass | - 4 | -190 | -157 | -58,219 | -102,589 | -215,245 |
| l Works, machinery | - 3 | -875 | 663 | -174,073 | -589,624 | -558,280 |
| ing in Wood | - 1 | -227 | 329 | -35,014 | -96,758 | -130,689 |
| , Drinks * | 74 | 626 | 1,593 | 128,248 | 506,933 | 406,457 |
| hing, Textile | | | | | | |
| fabrics | 4 | -209 | 132 | -19,965 | -109,807 | -163,910 |
| s, Paper, Printing | 3 | -6 | - 77 | 12,287 | -25,100 | 70,819 |
| cles, saddlery, | | | | | | |
| harness | 3 | -1,009 | 487 | -79,746 | -841,518 | -914,717 |
| iture, Bedding | - | -114 | 8 | -19,097 | -16,590 | -60,890 |
| s, Chemicals | -1 | 22 | 304 | 30,382 | 56,126 | 138,881 |
| , Light & Energy | -1 | 86 | 3,016 | 5,130 | 27,663 | 52,562 |
| Other | -1 | -14 | 7 | 583 | -43,354 | -55,449 |
| Total | 64 | -1,947 | 6,165 | -209,820 | -1,225,948 | -1,451,786 |

* Bakeries included for the first time.

RETURN NO. 2.

ONE AND FIVE YEARS' COMPARISON OF AGGREGATES OF MAIN ITEMS.

| Item | 1922-23 | 1926-27 | 1927-28 | Increase or Decrease 1927-28 one and five years | |
|--------------------------|---------|------------------------|---------|---|-----------------|
| | | | | over 1926-27 | over 1922-23 |
| | | <u>HANDS AND POWER</u> | | <u>USED</u> | |
| Establishments X No. | 1,609 | 1,807 | 1,871 | 64 | 262 |
| Employees - Males No. | 27,988 | 34,980 | 33,173 | - 1,807 | 5,185 |
| Employees - Females No. | 6,707 | 7,184 | 7,044 | - 140 | 337 |
| P.) Total No. | 34,695 | 42,164 | 40,217 | - 1,947 | 5,522 |
| Engining Proprietors No. | 1,458 | 1,505 | 1,517 | 12 | 59 |
| Power actually used H.P. | 67,000 | 146,153 | 152,318 | 6,165 | 85,318 |

X 73 Bakeries included for the first time.

MONETARY ITEMS.

| | | | | | |
|---|---------------|------------|------------|------------|-----------|
| Bakeries & Canteens (ex.W.P.) £ | 5,943,745 | 8,390,603 | 8,177,541 | - 213,062 | 2,233,796 |
| (W.P.) £ | Not collected | 441,269 | 444,511 | 3,242 | 444,511 |
| Materials, fuel, light, &c. £ | 16,964,007 | 23,233,063 | 22,007,115 | -1,225,948 | 5,043,108 |
| Expenses for all special expenses, depreciation & profits £ | 3,996,023 | 4,823,534 | 4,807,516 | 16,018 | 811,493 |
| Value of - £ | 26,903,775 | 36,888,469 | 35,436,683 | -1,451,786 | 8,532,908 |
| Factory land & buildings £ | 5,324,484 | 8,207,999 | 8,796,936 | 588,937 | 3,472,452 |
| Factory Plant & Machinery £ | 5,519,035 | 8,741,929 | 9,378,442 | 636,513 | 3,859,407 |

DISTRIBUTION OF EVERY £100 OF GROSS OUTPUT VALUE.

| | | | | | |
|---|--------|--------|--------|-------|--------|
| Bakeries & Canteens (ex.W.P.) £ | 22.09 | 22.74 | 23.08 | 0.34 | 0.99 |
| Material, fuel and light £ | 63.06 | 62.98 | 62.10 | -0.88 | - 0.96 |
| Expenses for all special expenses, depreciation & profits £ | 14.85 | 14.28 | 14.82 | 0.54 | - 0.03 |
| Total £ | 100.00 | 100.00 | 100.00 | - | - |

VALUE OF PRODUCTION (BEING AMOUNT ADDED TO MATERIAL BY PROCESS OF TREATMENT.)

| | | | | | |
|---------------------------------|-----------|------------|------------|-----------|-----------|
| Production Value £ | 9,939,768 | 13,655,406 | 13,429,568 | -225,838 | 3,489,800 |
| " per head of mean population £ | £ 19:7:4 | £24:2:2 | £23:6:8 | - £0:15:6 | £3:19:4 |

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